



QAD Enterprise Applications
Enterprise Edition

Conversion Guide
QAD Enterprise Asset
Management:
EAM 11 to EAM 2016

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QAD Enterprise Asset Management 2016
March 2016

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EAM Conversion Guide Change Summary

The following table summarizes significant differences between this document and the previous versions.

Date/Version	Description	Reference
March 2016/EAM 2016 (EAM 13)	Updated guide for conversions to EAM 2016	---
March 2015/EAM 12.9 (EAM 2015)	Rebranded for EAM 12.9 (EAM 2015)	---
	Reorganized Upgrade EAM v11 DB to OE10 or OE11	page 4
	Updated Figure 2.1	page 6
	Updated Figure 2.2	page 7
March 2014/EAM 12.7	Updated Figure 2.4	page 7
	Added information in the Prepare to Upgrade section about connecting to the required databases	page 5
November 2013/EAM 12.6-Rev1	Updated Figures 2.1, 2.2, and 2.4	page 6, page 7
	Added SE to EE conversion information to Requirements section	page 2
October 2013/EAM 12.6	Numerous revisions	---
	Added OE 11.2 deployment information	page 5
April 2013/EAM 12.5.1	Initial version of guide	---

Conversion Overview

This chapter provides an overview of EAM 11 to EAM 2016 conversions.

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Introduction

This guide explains how to convert from EAM 11 (the Graphical User Interface version) to EAM 2016 (the QAD .NET UI version). It also describes how to move the static and transaction data from an EAM 11.x database to the latest EAM 2016 environment. That upgrade candidate environment could be the test or production database for the existing version of EAM.

The EAM conversion program converts all of the EAM/MLS 11 data in-place to the latest version of EAM 2016. The program creates a .txt log in the *log* folder (*conv-hist-log.txt*). Logs of the completed promotions are stored in the EAM database. These logs prevent running the conversion a second time.

Requirements

Be sure that you meet the following requirements before attempting an EAM 11 to 2016 conversion:

- You are an experienced system administrator with knowledge of the operating systems involved and EAM installation and configuration.
- You have OE10.1B, OE10.2B, OE11.2, or OE11.6 installed on the client and server.

Warning Only fully qualified personnel should attempt an EAM conversion. Failure to observe this requirement can have serious consequences.

If you are upgrading from QAD SE to EE, there is currently no migration tool for EAM. For further assistance, contact QAD Support.

EAM 11 and EAM 2016 Functionality Differences

Before you upgrade from EAM 11 to EAM 2016, you should understand the functionality differences between the two versions. The following EAM 11 features are not present in EAM 2016:

- Inventory Master
- Expert repair

In addition to the differences noted above, EAM 2016 handles reports differently than EAM 11.

EAM Conversion

This chapter describes the EAM 11 to EAM 2016 conversion process.

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Overview

This chapter describes the EAM 11 to EAM 2016 conversion process. This process consists of the following major tasks:

- Verifying the Progress version
- Downloading the conversion programs
- Upgrading the EAM v11 database to OE10 or OE11
- Deploying programs
- Preparing to upgrade
- Running the EAM upgrade
- Exporting data from converted database
- Importing data into the final EAM 2016 database
- Assigning security roles to users

Verify Progress Version

Verify that you have OE10 or OE11 installed on a client and the database server. If you have an EAM 11 database on Progress v9, you will convert it after downloading the latest conversion programs.

Download Conversion Programs

Contact QAD Support for the latest EAM v11 to EAM 2016 conversion programs.

Upgrade EAM v11 DB to OE10 or OE11

Linux/UNIX Environments

If your EAM database is Progress 9, manually convert it to OE10 or OE11, or use the PROUTIL command to automatically convert it. See the Progress DBA documentation for more information.

If you plan to run the conversion programs from a Linux/UNIX server, use the following steps:

- 1 Create a temp conversion directory (for example, `mkdir /apps/qadapps/eam/conv` or `/temp/conv`).
- 2 Copy the conversion program .zip file to the conversion folder (for example, `/apps/qadapps/eam/conv` or `/temp/conv`).
- 3 Extract the conversion programs to the conversion folder.
- 4 Create a conversion parameter file (for example, `conv.pf`) to connect the mls, dataacc, and qaddb databases.

The v11 mlsstat database is no longer used in EAM 2016. You can find a sample .pf file in the `Sample-pf-ini-shortcut` folder.

- 5 Launch a Progress Procedure editor (for example, `mpro -pf /temp/conv.pf`).

- 6 Set the conversion folder in the PROPATH (for example, `propath = "/apps/qadapps/eam/conv" + " , " + propath`).
- 7 In the Progress editor, type `run conv1113.p` to run the conversion programs.
- 8 Proceed to Run EAM Upgrade on page 6.

Windows Environments

Deploy Programs

- 1 Create a folder on the client machine. This guide refers to this folder as the `<deploy_folder>`.
- 2 Place and unzip `V11-V13Conversion.zip` in `<deploy_folder>`.
- 3 If you are using OE10.1B, do the following:
 - a Copy `<deploy_folder>/product/OE101B/dictvar.i` to `<deploy_folder>/product/`.
 - b Copy `<deploy_folder>/product/user/OE101B/uservar.i` to `<deploy_folder>/product/user.EAM`

If you are using OE10.2B, do the following:

- a Copy `<deploy_folder>/product/OE102B/dictvar.i` to `<deploy_folder>/product/`.
- b Copy `<deploy_folder>/product/user/OE102B/dictvar.i` to `<deploy_folder>/product/user.`

If you are using OE11.2, do the following:

- a Copy `<deploy_folder>/product/OE112/dictvar.i` to `<deploy_folder>/product/`.
- b Copy `<deploy_folder>/product/user/OE112/dictvar.i` to `<deploy_folder>/product/user.`

If you are using OE11.6, do the following:

- a Copy `<deploy_folder>/product/OE116/dictvar.i` to `<deploy_folder>/product/`.
- b Copy `<deploy_folder>/product/user/OE116/dictvar.i` to `<deploy_folder>/product/user.`

Prepare to Upgrade

- 1 Connect to the required databases. For stand-alone upgrades, connect to:
 - EAM database
 - DATAACC database

If EAM is integrated with MFG/PRO or ERP, connect to:

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- EAM database
- DATAACC database
- qaddb

2 Back up the EAM 11 OpenEdge database and restore it to a new location. This new copy of the database will be converted to EAM 2016.

Note Start the new database copy using a new port number. Record the port number for future reference.

3 Back up the QAD mfg database and restore it to a new location. This new copy of the mfg database is updated while the EAM database's data is being converted.

Note Start the new database copy using a new port number. Record the port number for future reference.

4 Create the .ini and .pf files and a shortcut.

- a Copy the contents of `<deploy_folder>\Sample-pf-ini-shortcut` to a new location on the server. This folder is your working folder.
- b Modify the working folder's .pf file according to the comments in the file. Be sure that the .pf file points to the new databases created in steps 1 and 2.
- c Modify the DLC, PROMSGS, and other values in the working folder's .ini file to point to your machine's OpenEdge location.
- d Update the working folder's shortcut to reflect the working folder and OpenEdge locations.

5 Proceed to Run EAM Upgrade.

Run EAM Upgrade

1 Double-click the shortcut from the working directory. The Progress Procedure Editor opens.

2 In the Procedure Editor, use the File menu to open `<deploy_dir>/conv1113`.

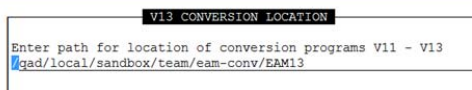
3 Press F2 to run `conv1113`.

4 At the V13.0 Conversion Location screen (Figure 2.1), enter the path for the conversion programs. Then press Enter.

Note If you receive an error message about your PROPATH, contact QAD Support.

Fig. 2.1

Conversion Location Screen



5 At the EAM V13.0 Upgrade screen (Figure 2.2), you have several options:

- Option 1 - Display Upgrade Promotion Numbers: Reserved for QAD Support.
- Option 2 - Log Maintenance: Reserved for QAD Support.

- Option 3 – RUN EAM UPGRADE.

Fig. 2.2
Starting the Conversion

```

EAM V13 UPGRADE
Last upgrade completed... 0
Current EAM Version..... 217. 2016-01-14 (EAM V13)

-----OPTIONS-----
1. Display Upgrade Promotion Numbers.
2. Log Maintenance
3. RUN EAM UPGRADE
99. Exit

Enter option..... 3

```

- 6 Select Option 3 to start the conversion.
- 7 When you are presented with the EAM UPGRADE TYPE frame (Figure 2.3), select 1 if EAM 11 was integrated with MFG/PRO or Standard Edition. Select 2 if EAM 11 is running stand-alone.

Fig. 2.3
EAM Upgrade Type

```

EAM UPGRADE TYPE
1. Upgrade EAM, synchroize with MFGPRO.
2. Upgrade EAM, non ERP system.
99. Exit

Enter option..... 1

```

- 8 Press F2 when you are presented with the EAM Upgrade frame (Figure 2.4).
Note This frame is presented several times throughout the conversion process. It always defaults to the correct starting number.

Fig. 2.4
Enter Last Upgrade Number

```

EAM Upgrade
Enter Starting Upgrade Number... 1
Enter Last Upgrade number..... 217

```

- 9 Enter the system's Domain Code and press Enter (Figure 2.5).

Fig. 2.5
Enter Domain Code

```

DOMAIN CODE
Enter Domain code..... USA

Are these promotions correct? Yes

```

- 10 While the program runs, the system displays the Conversion in Progress screen and provides a running update on the conversion (Figure 2.6).

Fig. 2.6
Conversion in Progress Screen

```

CONVERSION IN PROCESS
Converting promotion: 01. Convert-system
Converting promotion: 02. 2007-03-28

system read: 1
Reading data: 1792

```

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Note At the end of promotions 128 and 129, the program stops and asks you to restart conv1113.p (Figure 2.7 and Figure 2.8). This behavior is normal and allows the schema changes to take effect.

Note In this case, ABORT means that the process is halting. The conversion steps to this point are preserved.

Fig. 2.7
Must Abort and Restart

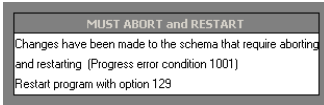
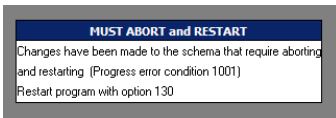
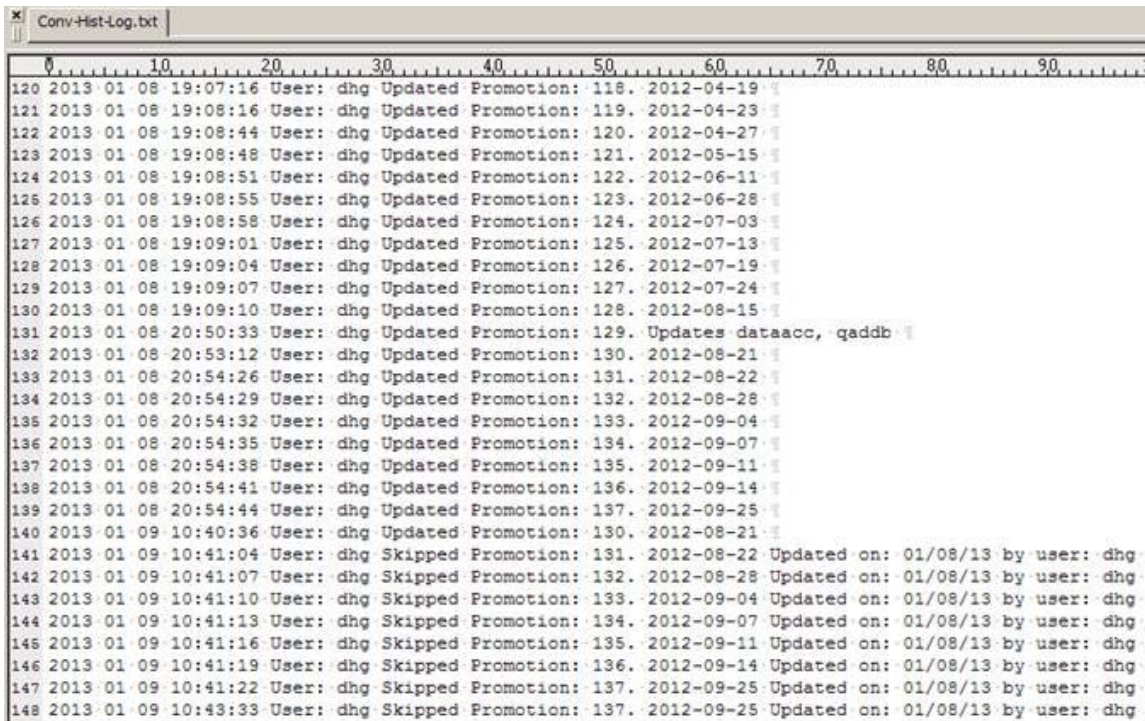


Fig. 2.8
Must Abort and Restart



Once the program starts, it creates the `conv-hist-log.txt` log file, which you can find in the log folder in the current conversion working directory. While the conversion is running, you can monitor `conv-hist-log.txt` to watch the progress of the update along with the displays from the Progress Editor. This screen sometimes goes blank. This behavior is normal.

Fig. 2.9
Log File Content



11 The program displays the message “Conversion Complete” when this phase finishes (Figure 2.10).

Fig. 2.10
Conversion Complete Message



Note Contact QAD if the conversion stops and displays an error message. Provide the error message and any relevant screen shots.

Export Data from Converted EAM Database

- 1 Export the converted data (all tables and sequences) from the source database to a secure location.

Note Repeat this process against the mfg database if it was included in the conversion.

Import Data into Final EAM Database

You now load the newly converted and exported EAM/MLS 11 data into an official prod database. Back up the prod and empty versions of the EAM database that the EAM 2016 installer created. When both backups are complete, restore the empty database into the prod database. This action, in effect, removes all base data from the official 2016 prod database and makes it ready to receive the converted data.

When all backup and restore activities are complete, import the converted data (all tables and sequences) into the 2016 prod database.

Note Repeat the process against the mfg database if it was included in the conversion.

Assign Security Roles to Users

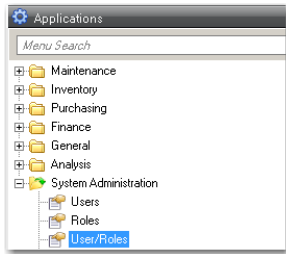
The security mechanism in EAM 2016 is different from EAM 11. It uses a role-based mechanism in which users can be assigned multiple roles. User Roles combine so that a user with three roles has access to all of the activities that each role grants.

Note The new functionality delivered in patches and service packs is disabled by default. It is the system administrator's responsibility to update the roles.

The final step in the conversion process is to assign the default roles to each EAM user. To assign roles manually, use the following steps. QAD also has a bulk-load utility that helps assign roles to many users (contact QAD support or the EAM R&D team for more information).

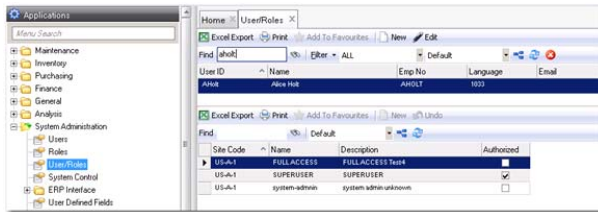
- 1 Ensure that all services have been started on the database server.
- 2 Install the EAM client by opening `http://<server_name or IP_address>/qadhome_eam` in a web browser.
- 3 Log in to EAM as `sysadm` or `mfg` and navigate to System Administration|User/Roles (Figure 2.11).

Fig. 2.11
Applications Menu



- 4 Double-click the User/Roles option to display the User/Roles browse.
- 5 The upper browse lists all EAM users. The lower browse displays the site/role combinations that are available to the selected user (Figure 2.12).

Fig. 2.12
User/Roles Browse



- 6 Highlight the site and role that you want to assign to the user and click the box in the Authorized column. Repeat as necessary.